

2024 Campaign Manager ACTION GUIDE

A Step-By-Step Tool for Success!

Be sure to visit www.unitedwaysc.org for additional resources.



Make a bigger impact

Employee Campaign Managers (ECMs) are the critical link between United Way of Santa Cruz County and the employees that help us ignite our passion to give back. In this Action Guide are tips for strengthening your campaigns, getting more employees engaged and, overall, making a lasting impact on our community and your company.

In this Action Guide you'll find:

- Step-by-step instructions on planning every aspect of campaign, from the logistical to the fun
- Ideas and tips to make campaign more engaging
- Links to additional resources

We hope you'll use this as the go-to resource for your campaign needs, but an Action Guide can only do so much. Your United Way Campaign Staff is always available to help with the rest, so please reach out to us.

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About United Way

OUR MISSION

We ignite our community to give, advocate and volunteer so that our youth succeed in school and life, our residents are healthy and our families are financially independent

WHAT WE WANT TO COMMUNICATE

- We are committed to our Youth Well-Being Goals
- We are results-driven & research-based
- We are focused on collaboration with community partners
- We raise money locally and invest it locally
- We strive to connect our donors to our work through affinity groups & engagement opportunities

Our Impact Areas

HEALTHY COMMUNITY

Improving health and well-being for all

YOUTH OPPORTUNITY

Helping young people realize their full potential

FINANCIAL SECURITY

Building financial stability and strength

COMMUNITY RESILIENCY

Addressing urgent needs today for a better tomorrow

Our Programs



Other Projects & Initiatives

- Shared Safety Workgroup
- Children's Network
- Community Assessment Project (CAP)
- Annual Stuff the Bus

Employee Campaign Manager (ECM)

Position Description

You're the right fit for the ECM role if...

- You want to expand your leadership skills.
- You have an energetic personality.
- You're a trusted co-worker.
- You embrace your company's culture of philanthropy.
- You inspire others to make an impact in the local community!

Benefits:

- Grow your leadership, project management and public speaking skills. Showcase your commitment & leadership to others in your company.
- Collaborate with a team of compassionate & talented coworkers from different departments.



Top 10 Best Practices

A step-by-step guide to running a great campaign

1 *Recruit A Team*

Don't run your campaign alone. Recruit a committee of enthusiastic, resourceful and committed employees to help you plan the best possible campaign!

- Diversity is important. Involve people from various departments in your organization, such as marketing, human resources, payroll, etc.
- Set up regular committee meetings and delegate responsibilities
- You can ensure campaign success by creating roles and responsibilities for committee members
- Ex: Marketing & events, campaign communication, department liaison, payroll contact, etc.

Our team is:

2 *Determine Your Timeline*

Keep your campaign strategically timed and goal-oriented.

Campaign startdate: _____

Campaign end date: _____

Starting a campaign with a clear kickoff and wrapping up with a great finish and often an important consideration—think about these things when you decide the timing.

Talk with your United Way Campaign Staff to determine the best timeframe for your company, and be sure to keep them in the loop as you move forward.

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Set A Challenging Yet Attainable Goal

Be ambitious but realistic so your coworkers have an attainable goal to reach.

- Assess 2021 data
- Identify potential
- Identify growth
- Determine if your company will focus on: increasing participation, increasing employee dollars, striving to achieve particular campaign goals, etc.
- Work with your UW Staff to set your goal(s)

OUR 2024 GOAL(S):



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Plan Your Employee Campaign Activities

It's important to provide multiple opportunities for employees to learn more about the community needs and how they can get involved.

Hold meetings and events throughout your campaign to get employees together and have fun! Ensure the event offers employees plenty of ways to learn and understand what their contribution to UWSCC can accomplish.

Our presentation(s) will be on: _____

Our special events will be: _____ on _____ (date)
_____ on _____ (date)

Meetings and special events can be flexible to match the culture of your company, but for maximum impact, be sure to invite your United Way Staff so we can showcase the work happening in the community and help you share real stories of those who are impacted.



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Schedule Your Volunteer Projects



Did you know UWSCC can help you develop a corporate volunteerism program, from a one-time opportunity to a year-round calendar?

The average gift of someone who volunteers and donates is over \$500. The average gift of someone who donates is \$331.

Stuff The Bus is in early August. This is a great way to get introduced to UWSCC's volunteerism efforts and create employee comradery!



Our volunteer projects are:

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Promote Leadership Giving

Set a meeting designed to educate organizational leaders about the benefits of giving at the Leadership Donor level.

UWSCC Leadership Levels:

- Bronze: \$500+
- Silver: \$1,000+
- Gold: \$2,500+
- Platinum: \$5,000+
- Founder: \$7,500+
- Tocqueville Society: \$10,000+

Our leadership giving meeting is:



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Communicate With Employees About Campaign

Consider using email, pay stub inserts, Outlook/calendar requests, and UWSCC materials to promote the campaign.

Hang posters and flyers in prominent places to announce the UWSCC dates and important information. Be sure to have a single point of reference for employees to access campaign information.

Make sure you have the following essential UWSCC materials:

- Online Campaign Website Link
- Posters
- Pledge forms
- UWSCC video
- UWSCC affinity group information
- Matching grant information (if applicable)

Our communication plan

We will send communications via:

_____ on _____ (date)

_____ on _____ (date)

_____ on _____ (date)

We will hand out:

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Don't forget to say "THANKS!"

Ensure your employees have a positive campaign experience. Making them feel appreciated increases the likelihood they will donate again.

Thank donors, employees, leadership team, and your campaign team in a timely fashion after the end of the campaign.

Thank contributors for participating in the campaign/volunteer efforts with incentives such as prize drawings, a thank you luncheon or personal letters.

Our "thank you" plan:

We plan to offer these incentives:

We plan to say "thank you" by:

_____ (date) via
_____ (event, letter,
etc.)

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Finalize Your Campaign

The steps below outline the appropriate measures for closing your campaign:

- Publicize your campaign's end date and ensure all pledge forms are turned in by the deadline.
- Contact your United Way Staff to arrange for a brief, 15-minute meeting.
- Going through the pledges together before sealing the envelope can save a lot of time in the long run!
- Remind donors to keep a copy of the pledge form for tax purposes.

Results will be turned in to UWSCC
by: _____

10 *Stay In Touch!*

Stay in touch with us....

Your United Way is here to help year-round. Have quarterly emails to keep you up to date on what's going on at UWSCC and to learn about your company's support for UWSCC has helped improve lives in Santa Cruz County.



Stay in touch with us....online!



www.unitedwaysc.org



[@unitedwayofsantacruzcounty](https://www.facebook.com/unitedwayofsantacruzcounty)



[@unitedwayofsantacruz](https://www.instagram.com/unitedwayofsantacruz)



[United Way of Santa Cruz County](https://www.linkedin.com/company/united-way-of-santa-cruz-county)



[@UWSantaCruz](https://twitter.com/UWSantaCruz)

Campaign Timeline

Tips on when to plug in best practices

4-8 Weeks Before Campaign

- Meet with your United Way Campaign Staff
- Recruit a team of representatives from each department and schedule meetings
- Attend Employee Campaign Manager Training with your campaign team
- Meet with your company's CEO/Senior Management Team to:
 - Secure endorsement and commitment to participate in campaign events & volunteerism
 - Approval of campaign budget
 - Get confirmation on campaign goals and objectives
- Meet with your campaign team
- Establish campaign goals/objectives, and timeline/plan of action for all activities
- Finalize communication strategy
- Put information in a central location for employees to access
- Schedule United Way speaker(s) for staff meetings, kick-off or Lunch & Learns
- Work with United Way Campaign Staff on pledge tools
- Send calendar requests to all staff to attend all campaign events

2-4 Weeks Before Campaign

- Meet with your campaign team and confirm delegation of tasks Re-confirm your campaign goals and objectives
- Confirm your dates/times for campaign activities
- Familiarize yourself with campaign materials
- Plan details for special events
- Confirm your United Way speaker(s)
- Inform staff of campaign details and goals



1 Week Before Campaign

- Together with your United Way Campaign Staff, provide your campaign team with training on United Way's Youth Well-Being Goals, programming details, and engagement opportunities.
- Send out CEO/Senior Management Team endorsement letters
- Reinforce campaign goals and incentives
- Send reminders about campaign kick-off and events



Week of Campaign



- Meet with United Way Campaign Staff to share details of campaign kick-off
- Host your campaign kick-off event and emphasize the endorsement of your company's leadership
- Conduct your campaign events
- Continue to promote your campaign
Update employees on progress toward the goal

1-2 Weeks After Campaign

- Collect all pledge forms and submit campaign report to your Staff. The report should include a spreadsheet of your donors
- If you utilized online campaign, you will receive a campaign report
- Thank your staff who helped in any way and those that donated
- Host a thank you event
- Announce results to staff
- Conduct a debrief meeting with your UW Staff
 - Evaluate your campaign results
 - Identify opportunities for next years campaign
 - Discuss year-round engagement opportunities



Year Round Engagement

- Connect with your United Way Staff member to plan year-round lunch and learns, volunteer opportunities, and more.
- Attend Campaign Manager Forums, sign up for e-newsletters
- Discuss with company leadership about succession plan for campaign managers
- Present information to your staff about UW Affinity Employee Groups
 - SCC
 - Emerging Leaders Circle
 - Women in Philanthropy
 - Leadership Giving Circle (\$1,000+Annual Gift)



Year Round Engagement

- Schedule meeting with your United Way staff to discuss your corporate social responsibility goals
- Visit our volunteer webpage for the most up-to-date information regarding projects and events



*Thank
You*



UNITED WAY
of Santa Cruz
County